

HSBC take the opportunity to save staff 25 minutes per day each

HSBC is the world's local bank. HSBC's culture embraces learning – with internal training courses on various subjects, a library of learning materials open to all employees and dedicated training staff.

In 2002 HSBC began to relocate 8000 staff from 20 London buildings to the new HQ, a prominent 44 storey building at Canary Wharf.

HSBC grasped the opportunity to implement innovative working practices to complement the new HQ building design.

Many business processes went from being heavily paper-based to electronic, resulting in a “less paper” office.

Employees were given a limited quota of paper filing they could transfer to the new HQ.

To achieve this an electronic document management system called ‘e-Documents’ was implemented, providing central storage for all documents, including emails.

An existing HSBC training team was dedicated to training the occupants of the new HQ on these knowledge management initiatives.

Consequently, prior to the move to the new building, a 70% paper filing reduction was achieved. This result was recognised by an Institute of Financial Services award for innovative knowledge management in 2002.

One of the challenges of knowledge management is the filtering and combating of information overload. The senior manager of HSBC Knowledge Management noticed email overload was occurring throughout HSBC. He felt email was ‘ruling his life’ and heard this was the case for many other managers.

Clearly the move to electronic ways of working meant that staff were more reliant on email than ever, to the extent of misuse.

The Issues

Many HSBC staff were experiencing email overload.

Anecdotal evidence showed people were finding email ‘burdensome’, ‘controlling’, ‘frustrating’, and ‘addictive’.

Constant copying of line managers and irrelevant parties into emails was creating unnecessary traffic, time wastage and increased stress levels. The purpose of many emails was sometimes vague.

Subject lines were not being used effectively – sometimes one word was placed in the subject line that provided no detail on content.

There was clearly an opportunity for changes to be made to email use that would benefit all staff and positively impact on the reliability of the systems.

Furthermore, during 2003 HSBC conducted a major organisational restructure. The need for cost effective use of resources was prominent.

It was evident an opportunity existed to provide behavioural training on email best practice. It was recognised that a successful programme could help further embed the new 'electronic' working culture.

HSBC and Emailogic

HSBC identified Emailogic as the partner for providing a training solution. The Emailogic solution was a generic, fun and engaging 90 minute seminar on email best practice.

The seminar included a methodology for measuring results through pre and post course questionnaires. Besides recording data the pre course questionnaires were also used to raise delegates' awareness of their current state. The post course questionnaires record similar data and also help resurrect the learning after 10 days.

The questionnaires are then matched and the impact the training has achieved is clear.

Delegates take away an individual action plan covering overload, how to write a good subject line, how to reply to an email and how to write a clear email.

Within the HQ exist differing abilities of email usage. Some people have been using email since its inception and others are less familiar with both functional and behavioural aspects. This seminar addresses the needs of all levels of learners.

Two HSBC managers attended a Emailogic seminar to evaluate this as a possible solution. They were extremely encouraged ("common sense but not common practice" one of them commented).

Consequently Emailogic delivered a pilot seminar to 19 HSBC senior managers.

The ability of the pilot to meet the learning objectives was measured through the use of the pre and post course questionnaires sent out before and then 10 days after the pilot.

The results showed that after attending the seminar the senior managers saved, on average, 30.3 minutes per person per day on time spent using email.

In addition they reduced the size of their inboxes by over 58%, were experiencing less stress and irrelevant emails received were down by 32%.

Having had senior managers attend the pilot, reinforced the belief in this solution –managers of this level would not support a learning initiative that would waste time.

The pilot success fuelled HSBC's decision to take the initiative further.

The Train the Trainer Approach

As HSBC already had a training team it made commercial sense to have them deliver the seminar under licence from Emailogic.

Emailogic's challenge was to ensure that the train the trainer programme would enable the HSBC trainers to achieve the same or similar results as the pilot.

A trainer's manual was produced specifically for HSBC and the delegate reference book updated to contain less paper.

Changes to the seminar content were made to include the addition of linking to e-Documents (the document management system); and customising the slide background to a graphic of the HSBC HQ.

During a one day workshop Emailogic trained an HSBC training team to facilitate the seminar.

The Roll Out

1650 staff attended the 90 minute seminar over a 6 month period in 2003. The training was delivered by 2 facilitators.

The Head of each Department was asked for their buy-in to the programme before the roll out. Each department was then asked to nominate an employee to coordinate attendance and the completion of questionnaires.

A marketing campaign was instigated with four posters presented in a series on each working floor in the building. Articles were also posted on the Intranet.

The lead time of the post course questionnaire changed from 10 days to 3 weeks - for an accurate reflection of the change in email behaviour.

As the roll out progressed further modifications to the seminar content included the addition of Lotus Notes specific tips on emailing, and addressing the growing issue of spam (junk) email.

What went well:

The marketing campaign attracted a good response.

Interest generated was extreme and sometimes there were not enough chairs.

Immediate feedback from delegates was hugely positive.

The volume of attendance also reinforced learning. Over 6 months, seminars were delivered regularly for 9 times each week. The critical mass of attendance assisted in reinforcing the behaviours promoted, as colleagues encouraged each other to improve.

The learning experience was positive, with delegates quoting that the seminar was 'relaxed but to the point'; and that the 'friendly style of the facilitators' and environment of 'sharing ideas' were beneficial.

Several delegates commented on the learning experience. They said facilitators were 'inspirational' and 'engaging'; and they were going to 'recommend the seminar to all their colleagues'.

Lastly, news spread and interest in the programme was generated outside the London office in New York, Dubai, and other UK HSBC offices.

The Results

Based on a total of 1650 employees who attended the seminar 585 pre and post course questionnaires were matched. The results are therefore based on a sample of 35.5% of those who attended. They are shown in the tables below.

3 weeks after the seminar delegates scored the change they experienced in their email behaviour

On average people reported that they were experiencing less stress, using the phone more and feeling more in control of their email.

In addition they were prioritising their email better and were receiving far fewer unnecessary emails.

We conclude that people's perception of their own performance has improved for all elements measured.

People also measured their actual performances. On average people's use of email has changed in the following ways:

Measurement of changes following the seminar Number	Average Change	%
Emails in inbox	- 123.1	- 33.9%
Number of irrelevant emails I receive per day	- 12.2	- 71.3%
Time spent reading/writing/managing my email per day (mins)	- 25.0	- 21.2%

Delegate comments 3 weeks after the seminar were generally extremely positive:

"This course was like having Delia Smith show us how to boil an egg. We thought we knew all about how to boil an egg. Yet actually, we are leaving the course knowing that we previously had no idea how to effectively boil an egg."

"This is the first short training session I have attended after which I actually immediately put into practice the skills and techniques I learned."

"The training has made dealing with your emails a joy instead."

"The time taken attending this course is repaid many times over in terms of time savings earned."

"Well worth the time attending, even though I have been using email for 15 years..."

Also, of the comments delegates made on their post course questionnaires 35% mentioned changes in their use of subject lines.

Richer communication has been achieved across the organisation following attendance at the seminar. Comments received on post course questionnaires included:

"I think more about whether I need to send an email, as opposed to a quick telephone call."

"I use a different medium where possible - face to face or phone instead of email all the time."

The results showed the success in capitalising on the change that was happening across HSBC headquarters, and using this culture of change further to enhance efficiency through the effective use of email.

Internal expertise was utilised and costs saved by HSBC facilitators being licensed to deliver the email seminar.

There is better management of email account sizes – people are more aware of quota limits and how to manage them than before the seminar.

Finally, the programme was extremely cost effective for HSBC. With an ROI based on the time saving v the cost of 4191%.

The senior manager who sponsored the pilot of this programme commented:

“Our email system had gone from being a corporate asset to a corporate liability. In short, we have regained a key asset. 25 minutes per person per day may not sound much, but scaled up across the 5,000 executives that will attend this training gives us over 200 working years of productivity back.”

HSBC and Emailogic jointly won a National Training Award for this roll out.

Finally, the tentacles of requests for further seminars and information have spread across HSBC.